TOURISM
THE PROFESSIONAL
CHALLENGE

APPENDIX 1

EMPLOYMENT IN THE TOURISM INDUSTRY IN BRITISH COLUMBIA

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EMPLOYMENT IN THE TOURISM INDUSTRY

IN BRITISH COLUMBIA

1991

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Pacific Rim Institute
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1.0 INTRODUCTION

It has long been recognized that there exist no reliable estimates of employment in the tourism industry in British Columbia.

Of course, tourism labour market data has always been available. Over the years it has been collected by various levels of government, by industry associations, and by special sub-sector studies. Unfortunately, each set of data has been collected to meet a specific need, so that as a whole, they contain a wide variety of methodologies, they apply to different years, and they vary greatly in reliability and detail. The result is a collection of non-comparable data.

At the same time, employment and employment growth estimates are essential for tourism human resource planning in the province.

Therefore the Pacific Rim Institute of Tourism, the British Columbia Government and the Government of Canada entered into an Industrial Adjustment Service (I.A.S.) Agreement containing, among other objectives:

* The development of an employment profile for the tourism industry in British Columbia and for each of the industry's eight sectors.
* Short and long-term employment projections for each of the eight tourism sectors.
* The development of an occupational and demographic profile of the industry.

The development of these employment projections and profiles was shaped in several ways.

First, the task was part of the larger "1990's Blueprint for Action" and the Blueprint Steering Committee stipulated a crucial parameter of the employment study: only secondary data were to be used, no new data were to be collected for the study. Secondary data sources were to be examined, and the best available data selected to provide a clear, concise and consistent profile of industry employment.

Second, whereas many industry studies examine employment in terms of full-time equivalent (FTE) positions or 'person-years' (PYs), this project would focus on the number of people employed in the industry. Since this was a human resource study, knowing the number of people employed in the industry was relevant, not full-time equivalents or person-years.

Third, three projections would be provided: 1993, 1997 and 2001. 1993 was chosen as the short-term projection. 1997 was chosen to allow for start-up and training time for the longer programs in the industry. 2001 was chosen to give a decade-long projection.

Fourth, given the seasonality of the industry and the resulting peaks and troughs of employment, employment figures should be the average number of people who worked in the industry and industry sectors each year. Similarly, employment projections should be for annual averages.

Fifth, the employment data should be for "Tourism-related Industries", not only for that part of each sector which can be attributed to non-local (i.e.tourism) demand. Some groups and studies have attempted to partition that portion of tourism-related industries which can be said to result from non-local demand. Thus, the National Task Force on Tourism Data (Department of Supply and Services, March 1989, page 19) estimated the proportions of sector activity which could be attributed to tourism to be: 100% for accommodation; 100% for passenger air, rail and ship transportation;

47% for recreation and amusement; 30% for rental cars; 17% for restaurant food services; and so on.

These estimates are national and have received little support in British Columbia. Calculating a true tourism share for British Columbia would require costly detailed studies and surveys on the origin of customers, from which shares of local and tourist demand could be calculated. Information of this type is not available.

Therefore, it was decided that in this project employment data should be sought for "Tourism-related Industries". This is also the approach taken by Tourism Canada in their recent selection of tourism Census data, by the B.C. Ministry of Development, Trade and Tourism in the Tourism Satellite Account, and by Employment and Immigration Canada in its occupational projection system.

Finally, the definition of tourism used in this project had to be compatible with both the eight sectors of the tourism industry and Statistics Canada's SIC (Standard Industrial Classification) used in the Tourism Satellite Account.

The following section discusses the definition of tourism used in more detail, and the remainder of the report provides the employment profiles, the projections and the occupational and demographic profiles.

2.0 INDUSTRY DEFINITION AND DATA SOURCES

Prior to determining the employment size of the B.C. tourism industry, the industry had to be defined and data sources selected.

2.1 Definition of the Industry

The tourism industry is a diverse group comprised of many different types of operators / businesses selling a range of products and services to tourists and travellers. Revenue and employment in the industry can be measured in two different ways:

- supply side - economic activity of businesses selling to tourists
- demand side - economic activity arising from expenditures made by tourists.

The two approaches measure different things. The supply side approach measures tourism from an "industry" perspective whereas the demand side approach measures tourism from an "activity" or consumer expenditure perspective. The demand side approach requires detailed domestic household and visitors surveys on expenditures, primary trip purpose activities, and so on.

Most Canadian industries, including resource and manufacturing industries, are generally defined using a supply side approach in which groups of firms with a common product or service for sale comprise an industry. The supply side approach has been advocated by the recent National Task Force on Tourism Data. It has also been adopted by the B.C. Ministry of Development, Trade and Tourism in their development of the Tourism Satellite Account, an adjunct to the system of Provincial Economic Accounts. For these reasons we employ a supply side approach in measuring tourism employment. What this means, for example, is that total activity

of hotels will include all hotel activities - rooms, restaurants, bars, recreation facilities, and so on.

It was noted earlier that the employment estimates derived in this study were required to be compatible with the industry definition of the Pacific Rim Institute of Tourism and the sectors being used in the Satellite Account. The Pacific Rim Institute of Tourism has described eight tourism sectors within the tourism industry in their promotional material developed for the community colleges. The Tourism Satellite Account has four main sectors.

To meet the needs of both parties we segmented the Satellite Account into eight groupings patterned on the headings initiated by the Pacific Rim Institute of Tourism. Precise Statistics Canada Standard Industrial Classification (SIC) codes were then assigned to the six largest sectors. The two smallest sectors, Events and Conferences and Tourism Services, could not be classified according to the SIC codes.

The eight sectors, defined by the SIC codes are presented in Exhibit 2.1. All British Columbia firms and businesses in the sectors listed in the exhibit are considered to be part of the "Tourism-Related Industry".

Exhibit 2.1 Tourism Industry Definitions.

	SECTORS	SIC[1]
I	**Accommodation**	
	Hotels, Motels, Trailer Courts.	911
	Lodging Houses, Residential Clubs.	912
	Campgrounds, Travel Trailer Parks.	913
II	**Food & Beverage**	
	Restaurants, Take-outs, Caterers.	921
	Taverns, Bars , Nightclubs.	922
III	**Adventure Tourism & Recreation**	
	Recreation Camps (Guide Outfitters, Salt & Fresh Water Fishing, Guest Ranches).	914
	Sports & Recreation (Golfing, Skiing, Boat Rentals & Marinas, Curling Clubs, Other Sports).	965
IV	**Transportation**	
	Air Transport & Services.	451
	Railway Transport & Related Services.	453
	Ferries	454
	Public Passenger Transport(Urban, Inter-urban, School Bus, Charter, etc)	457
	Other Transport (Taxicabs, etc)	458
	Auto & Truck Rental/Leasing	992
V	**Travel Trade**	
	Travel Agencies, Wholesale Tour Operators.	996
VI	**Attractions**	
	Motion Picture Theatres	962
	Theatrical & Other Stage Entertainment	963
	Commercial Spectator Sports (Horse Racetracks, Professional Sports Clubs, etc)	964
	Gambling Operations.	966
	Other Amusements & Recreation (Amusement Parks, Zoos and Gardens, Bowling Alleys,etc).	969
VII	**Events & Conferences**	N/A
VIII	**Tourism Services**	N/A

1. Statistics Canada. Standard Industrial Classification.12-501.1980 edition.

2.2 Data Sources Selected

The definition of the industry in Exhibit 2.1 was the primary determinant of the data sources selected. However, another important determinant was our preference for data that would allow employment projections to be updated regularly, at minimal cost and effort, as economic conditions change.

One-time projections are less satisfactory than projections repeated every few years or so. Therefore, our preference was for sources that are:

- relatively inexpensive, usually because the data are already collected by government and can be bought for a nominal price;
- replicated at least once a year;
- measure the same thing each time;
- timely, that is, the results are published soon after the data are collected; and,
- consistent with employment data for the economy as a whole as used by government statistical agencies.

The three data sources found to best fit the data selection criteria were the Labour Force Survey (LFS); the Canadian Occupational Projection System (COPS); and the Census. The first two will allow frequent updating of the projections, for a modest cost, and they are briefly described in Appendix A.

Appendix A also contains a list of experts in this field consulted about further possible data sources.

3.0 INDUSTRY EMPLOYMENT IN 1990

In 1990 employment in the eight B.C. tourism-related sectors was 181,600. Over 40% of this total employment was in the Food and Beverage sector. Indeed, the three sectors of Food & Beverage, Accommodation and Transportation dominate, accounting for more than 85% of employment.

Tourism-Related Sectors	1990 Employment	% of Employment
Food & Beverage	78,400	43.2
Transportation	43,100	23.7
Accommodation	30,100	16.6
Attractions	14,000	7.7
Adventure Tourism & Outdoor Rec.	9,200	5.1
Travel Trade	4,500	2.5
Events & Conferences	1,800	1.0
Tourism Services	500	0.2
TOTAL	181,600	100.0%

Exhibit 3.1 on the following page provides sub-sector detail.

Exhibit 3.1 B.C. Tourism-Related Industry Employment, 1990.

SIC	Sector	1990 Employment
	Accommodation	30,100
911/	Hotels, Motels, Trailer Courts.	
912/	Lodging Houses, Residential Clubs.	
913	Campgrounds, Travel Trailer Parks.	
	Food & Beverage	78,400
921	Restaurants, Take-outs, Caterers.	73,700
922	Taverns, Bars , Nightclubs.	4,700
	Adventure Tourism & Recreation	9,200
914	Recreation Camps (Guide Outfitters, Salt & Fresh Water Fishing, Guest Ranches).	1,500
965	Sports & Recreation (Golfing, Skiing, Boat Rentals & Marinas, Curling Clubs, Other Sports).	7,700
	Transportation	43,100
451	Air Transport & Services.	17,500
453	Railway Transport & Related Services.	10,400
4542	Ferries	3,600
457	Public Passenger Transport(Urban, Inter-urban, School Bus, Charter, etc)	6,500
458/ 992	Other Transport (Taxicabs, Auto & Truck Rental/Leasing).	5,100
	Travel Trade	4,500
996	Travel Agencies, Wholesale Tour Operators.	
	Attractions	14,000
963	Theatrical & Other Stage Entertainment	4,100
962/ 964/966	Motion Picture Theatres/Commercial Spectator Sports, Gambling Operations.	5,000
969	Other Amusements & Recreation	4,900
N.A.	**Events & Conferences**	1,800
N.A.	**Tourism Services**	500
	TOTAL	**181,600**

Sources for Exhibit 3.1.

Labour Force Survey 1990 Annual Averages, Unpublished Data, Statistics Canada for all sectors except:

Events & Conferences, and Tourism Services - estimate provided by Pacific Rim Institute of Tourism.

Ferries - The B.C. Ferry Corporation

Lodges etc - Three sector studies. Marine Tourism in British Columbia: Opportunity Analysis, a report prepared by The ARA Consulting Group (formerly the DPA Group) for Industry, Science and Technology Canada, BC Ministry of Tourism, and BC Ministry of Regional and Economic Development, March 1991. Guide Outfitters of British Columbia: Opportunity Analysis, a report prepared by the DPA Group for the B.C. Ministry of Tourism and the B.C. Provincial Secretary, June 1989. Guest Ranches of British Columbia: Product and Market Analysis, a report prepared by McLaren Plansearch, Tourism Research Corp and Addison Travel Marketing for the B.C. Ministry of Tourism, May 1987.

Note to Exhibit 3.1.

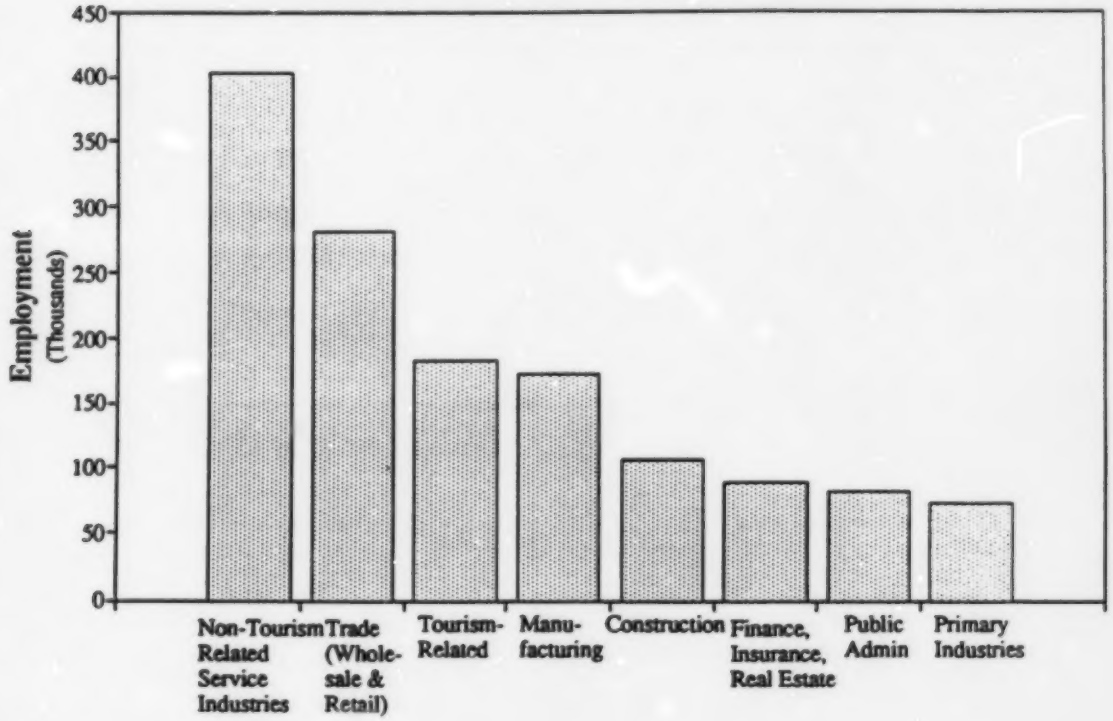
Some over-estimation of tourism-related employment is inevitable when using LFS 3 digit SIC codes. Only if 4 digit codes were available would it be possible to exclude some areas that should not be included in tourism-related employment (e.g. curling clubs in SIC 965). However, while some areas could not be excluded using the 3 digit codes, the amount of additional employment involved can be expected to be minimal.

In the majority of cases in Exhibit 3.1, the employment estimates were obtained from unpublished LFS data provided by the Labour Force Division of Statistics Canada. The estimates for the two smaller sectors of Events and Conferences and Tourism Services, sectors not fitting Statistics Canada's SIC codes, were provided by the Pacific Rim Institute of Tourism. In effect, the two latter employment estimates are very small parts of several other SICs: that is, they are an aggregate of some employment from the Educational sector; some employment from the Business Services sector; some employment from Public Administration; and so on. (Appendix B gives further details on this employment).

Now that we have determined that 181,600 people were employed on average in tourism-related industries in 1990, how does this employment compare with employment elsewhere in British Columbia? Exhibit 3.2 on the following page shows that employment in tourism-related industries is far less than employment in the aggregate of other service industries, and less than employment in trade (wholesale and retail) in British Columbia. But employment in tourism-related industries is higher than in manufacturing, construction, public administration, finance, insurance and real estate, and primary industries (agriculture, forestry, fishing, trapping and mining combined).

Of course, these results do not permit the conclusion that tourism is the third largest industry in B.C. These data are for employment in tourism-related industries, not that portion of these industries that can be attributable solely to non-local (tourism) demand.

Exhibit 3.2: Average Employment in 1990: Selected Industries in British Columbia



Source: Labour Force Survey Unpublished Data, Statistics Canada.

4.0 EMPLOYMENT PROJECTIONS TO 2001

Educational institutions, industry and government not only need to know current employment in the tourism-related sector, but they also require projections of employment for their human resource planning. As in other industries, projections of employment in tourist-related sectors can indicate where job openings may appear in the future, where training (both work-site and institutional) should be focused, and other labour market adjustments.

The planning horizon for projections related to training is the medium to long term. Programs take time to design, and time must be allowed for the training period in some of the longer programs in the industry. For this reason we present employment projections for the years 1997 and 2001. We also present a short term 1993 projection.

The projection procedure has two basic elements:

- first, establish 1990 base year employment, by sector, primarily from the Labour Force Survey (see Section 3); and
- second, apply growth rates embodied in the most recent COPS employment projections to the base 1990 LFS employment figures.

Clearly, all projections depend upon the information available at the time they are made. The projection procedure uses the most recent complete year of employment data (1990) and the growth rates embodied in the most recent COPS projections.

As each year of new employment data are received, the procedure should allow the projections to be up-dated and adjusted for unforeseen swings in employment and the economy. Moreover, the procedure should permit up-dating periodically at reasonable cost in time and effort.

The approach used in this paper allows the projections to be updated regularly since both the LFS employment figures and the COPS forecasts are updated annually. As well, the LFS employment figures are widely used by government and industry. COPS is the main source used for occupation projections by Employment and Immigration Canada, and the B.C. Ministry of Finance, Planning and Statistics Division.

4.1 Overview of COPS.

COPS is based on a large scale detailed econometric forecasting model developed by the firm of Informetrica. It uses as inputs a myriad of domestic and international data such as population growth (immigration, fertility rates, etc), world oil prices, economic growth in the U.S., U.S. Canada exchange rates, U.S. housing starts, and so on. COPS has both a demand and a supply side. The demand side which projects employment has greater relevance here.

The demand side of COPS starts with a macroeconomic outlook and output projections from the econometric model. Part of the output of the model is a projection of real Gross Domestic Product (GDP) by industry, for each province. The GDP projection is converted to an employment projection through applying output per worker/ productivity ratios. Finally, an industry-occupation transformation matrix is used to give the occupation mix within each industry. The end result is a projection of employment by industry and occupation.

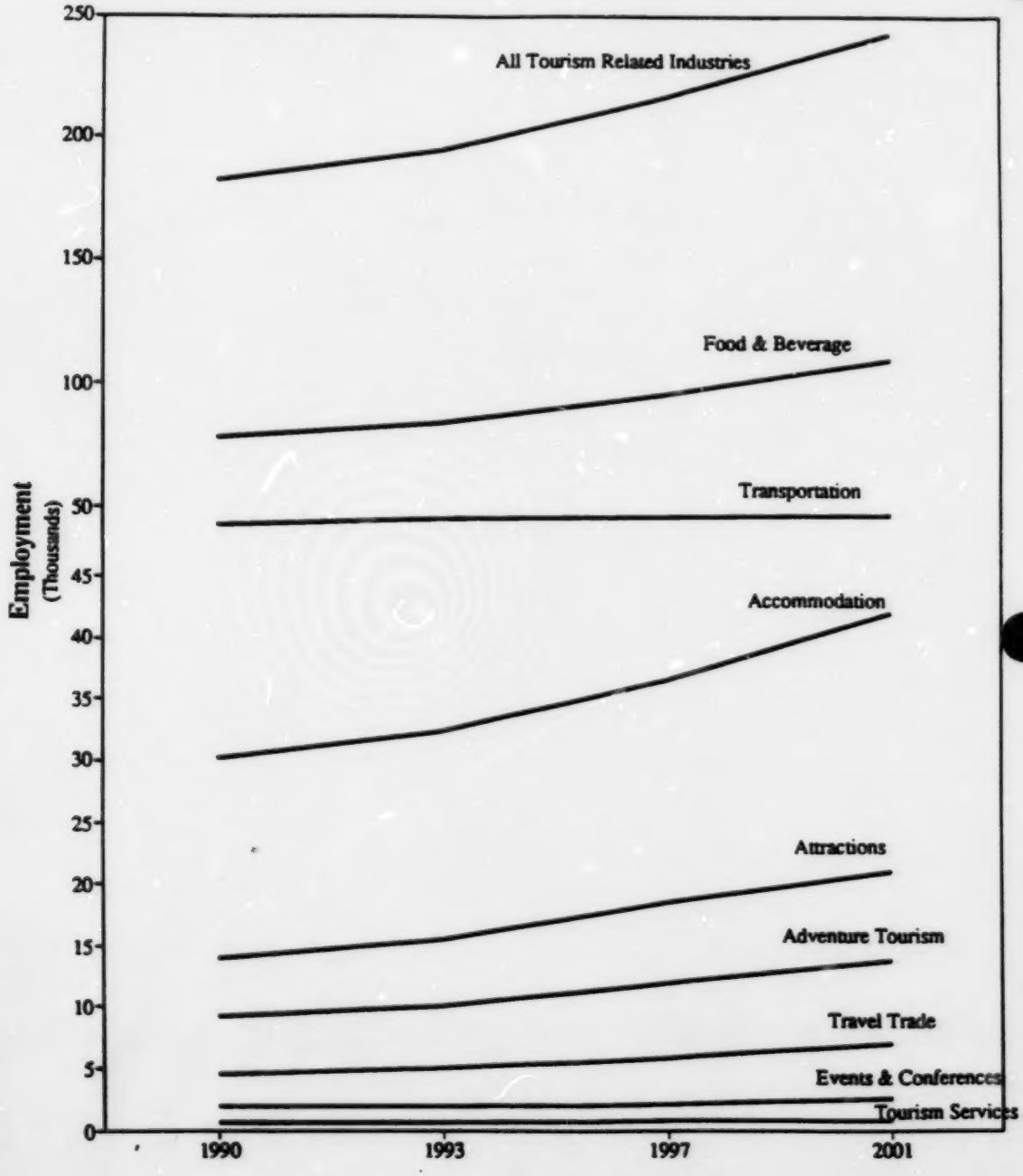
The projections made for the tourism-related industry in this study are based upon the growth rates embodied in the most recent COPS employment projections. The latest COPS projection assumes real economic growth in the province to average from 2.0% to 2.5% per annum between 1990 and the year 2001. Economic growth is forecast to be lower than this range in the early and late 1990's with a surge in economic activity occurring in the middle part of the decade.

The Canadian dollar is forecast to decline in value to approximately $0.82 U.S. between now and the end of the decade.

4.2 Employment Projections

The employment projections for the tourism-related industry are summarized in Exhibit 4.1. Projections for the sectors are provided in Exhibit 4.2 following.

Exhibit 4.1: Employment by Tourism Sector: 1990-2001



Source: Labour Force Survey Unpublished Data, Statistics Canada.

Exhibit 4.2 Tourism-Related Industry Employment Projections

	1990	1993	1997	2001
Accommodation	30,100	32,200	36,400	41,700
Food & Beverage	78,400	83,900	94,700	108,600
Restaurants, etc.	73,700	78,900	89,000	102,100
Taverns, Bars,etc.	4,700	5,000	5,700	6,500
Adventure Tourism & Outdoor Recreation	9,200	10,100	11,900	13,600
Lodges, etc.	1,500	1,600	1,800	2,100
Sports & Recreation	7,700	8,500	10,100	11,500
Transportation	43,100	45,000	46,200	47,200
Air Transport	17,500	17,800	17,600	17,600
Rail Transport & Services	10,400	11,700	12,100	12,600
Ferries	3,600	3,700	3,900	4,000
Public Passenger Transport	6,500	6,700	7,300	7,700
Taxicabs/Truck & Car Rental	5,100	5,100	5,300	5,300
Travel Trade	4,500	5,000	5,900	6,900
Attractions	14,000	15,400	18,300	20,900
Theatrical	4,100	4,500	5,400	6,100
Motion Picture/ Commercial Sports/ Gambling	5,000	5,500	6,500	7,500
Other Amusement & Recreation	4,900	5,400	6,400	7,300
Events & Conferences	1,800	1,900	2,100	2,400
Tourism Services	500	600	700	700
TOTAL	**181,600**	**194,100**	**216,200**	**242,000**

Sources for Exhibit 4.2

1990 Employment - Labour Force Survey (LFS)
1993,1997,2001 Employment - Growth rates from the Canadian Occupational Projection System (COPS) projections were applied to the 1990 LFS employment. That is, the projections for each of the tourism sectors were derived from the projected growth rates for selected COPS industries and occupations, as follows:
Accommodation - COPS Industry #64
Food & Beverage - COPS Industry #64
Lodges - COPS Industry #64
Sports & Recreation - COPS Industry #65
Air - COPS Industry #38
Rail - COPS Industry #39
Ferries - COPS Industrial Aggregate #38 to #42
Public Transport - COPS Occupation SOC 9171
Taxicabs - COPS Occupation SOC 9173
Rentals - COPS Industrial Aggregate #38 to #42
Travel Trade - COPS Occupation SOC 4193
Attractions - COPS Industry #65
Events & Conferences - growth rate of aggregate of the 6 largest sectors
Tourism Services - growth rate of aggregate of the 6 largest sectors

Note to Exhibit 4.2

Ruth Emery, Chief of Economic and Market Analysis at CEIC in Vancouver is responsible for COPS in this region. Her help and expertise in this project was greatly appreciated.

Thus, employment for the total eight tourism-related sectors is projected to increase to 242,000 by the year 2001, a net increase of over 60,000 from the 1990 employment level.

Again, the Food & Beverage and Accommodation sectors dominate, as Exhibits 4.2 and 4.3 indicate. Their employment growth accounts for seventy percent of the new employment growth in the industry. The increase in Adventure Tourism and Outdoor Recreation is interesting. This is a very small sector, but its growth in number employed is similar to that of the very large sector of Transportation.

Exhibit 4.3 Net Employment Increase: 1990 - 2001.

Tourism Sectors	Net employment increase 1990-2001
Food & Beverage	30,200
Accommodation	11,600
Attractions	6,900
Adventure Tourism & Outdoor Recreation	4,400
Transportation	4,100
Travel Trade	2,400
Events & Conferences	600
Tourism Services	200
TOTAL	**60,400**

Total employment in the province is projected to grow from its 1990 level of 1,469,000 to 1,748,000 by the year 2001. That is, the average annual growth rate is projected to be 1.6%. By comparison, the average annual growth rate of employment in tourism-related industries in B.C. to 2001 is projected to be 2.6%, or one-and-a-half times the annual average growth rate in employment in general.

4.3 Sector Growth Rates

Among the eight tourism sectors, annual growth rates are projected to be highest for Travel Trade, Attractions and Adventure Tourism and Outdoor Recreation. Annual growth rates for Food and Beverage and Accommodation are also projected to be above those of the province in general. By contrast, employment in Transportation is projected to be well below the provincial average.

Exhibit 4.4 Compound Annual Growth Rates: 1990 - 2001.

Tourism Sectors	Compound Growth Rates 1990-2001
Food & Beverage	3.0%
Accommodation	3.0%
Attractions	3.7%
Adventure Tourism & Outdoor Recreation	3.6%
Transportation	0.8%
Travel Trade	4.0%
Events & Conferences	2.7%
Tourism Services	2.7%
TOTAL	**2.6%**

Clearly, the tourism-related industry can expect healthy employment growth over the next decade, at a pace faster than that of the province as a whole.

5.0 WORKER PROFILES IN THE INDUSTRY

Earlier chapters in this report addressed the size of the tourism-related industry in British Columbia and projected its growth in employment to the end of the century. This chapter examines the characteristics of people who work in the industry:

- How old are they?
- Are they men or women?
- Do they have full-time or part-time jobs?
- Are their jobs seasonal or do they work all year round?
- How do they compare with workers in the B.C. labour force in general?

Worker profiles for the whole industry mask the variability within it, making it necessary to examine the tourism sectors individually.

The individual sectors differ greatly from each other. At one extreme, the Food and Beverage Sector has an exceptionally high proportion of young workers, most of whom are women, mostly working in part-time jobs. In sharp contrast, the Transportation Sector has much older workers, most of whom are men in full-time work all year round.

The other sectors lie in between. The Attractions Sector and Adventure Tourism and Outdoor Recreation Sector have high proportions of young people and a low number of full-time jobs that last all year round.

People working in the Accommodation Sector are similar in age to the B.C. worker in general, but proportionally more are women, and part-time and seasonal work is more common than for the B.C. labour force.

The final sector for which data are available, the Travel Trade Sector, is different yet again. This is the most female dominated tourism sector, with high proportions of the

25 to 44 year old age group, a good proportion of whom have full-time jobs all year round.

Details of the age, gender and work patterns of the people working in each of these tourism-related sectors are provided in the following six exhibits.

The exhibits cover the six largest tourism-related sectors, as defined in Exhibit 2.1. Together, these sectors account for 98% of the employment in the tourism-related industry in the province. As noted in Exhibit 2.1, Statistics Canada labour force data are not available for the remaining two small sectors of Events & Conferences and Tourism Support Services.

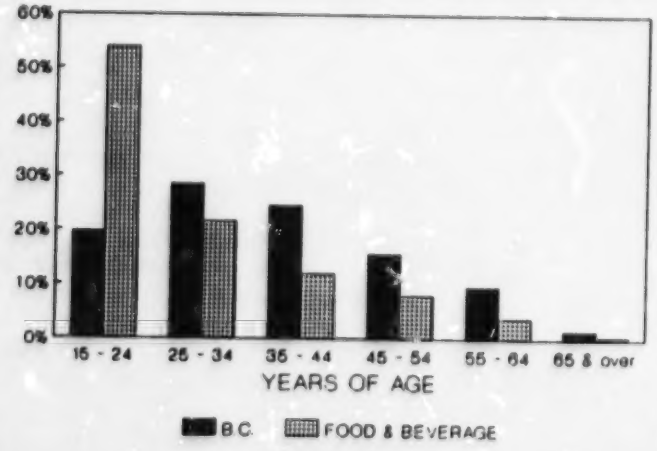
The age and gender data used in the six exhibits were obtained from Statistics Canada Cat. No. 93-113, Table 1; work pattern data (full-time, part-time, and full-year where full-year is defined as working 49 or more weeks per year) were obtained from Statistics Canada Cat. No. 93-113, Table 2. All data are from the 1986 Census.

THE FOOD & BEVERAGE SECTOR IN B.C.

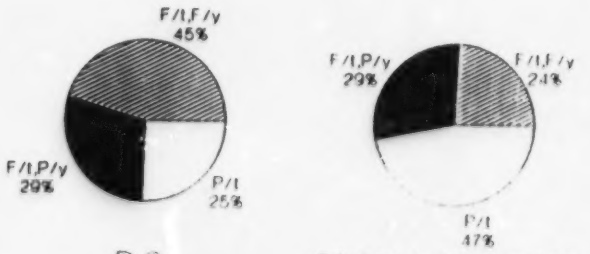
1. The majority (58%) of people who work in the Food & Beverage Sector are women. By comparison, women are only 43% of the British Columbia labour force.
2. People who work in this sector are very young. More than half (54%) are under 25 years of age. Only 20% of the general labour force is this young.
3. A very high proportion work part-time. Of those who work full-time, only half work all year round.

1. MEN & WOMEN: FOOD & BEVERAGE SECTOR

2. AGE OF WORKERS:FOOD & BEVERAGE SECTOR



3. WORK PATTERNS: FOOD & BEVERAGE SECTOR



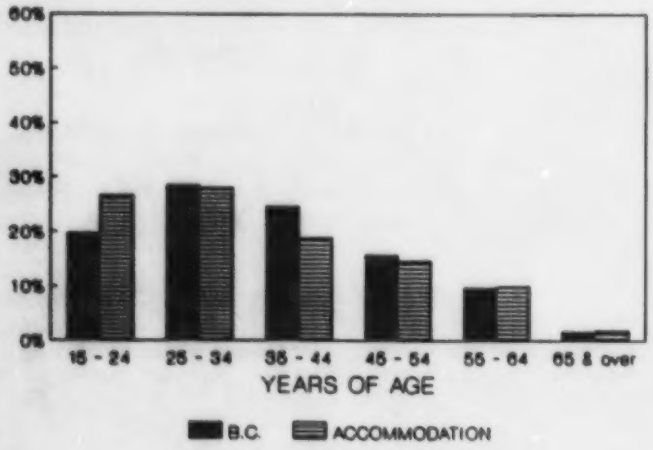
F/t,F/y = Full time & Full year
F/t,P/y = Full time & Part year
P/t = Part-time

THE ACCOMMODATION SECTOR IN B.C.

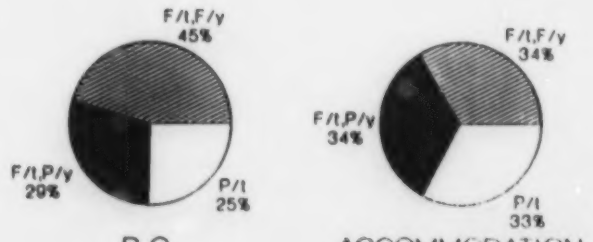
1. Women are 63% of the workers in the Accommodation Sector. This proportion is higher than in all other tourism sectors except Travel Trade, & very much higher than in the B.C. labour force.
2. People who work in this sector are similar in age but slightly younger than the general labour force in the province.
3. Only one-third works part-time in the sector. And half of the remainder has full-time work all

1. MEN & WOMEN: ACCOMMODATION SECTOR

2. AGE OF WORKERS: ACCOMMODATION SECTOR



3. WORK PATTERNS: ACCOMMODATION SECTOR

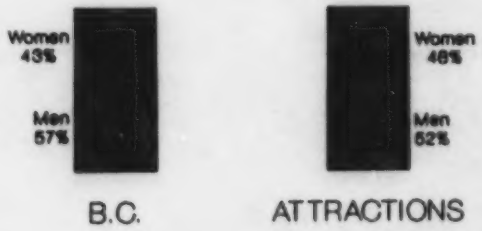


F/t,F/y • Full-time & Full-year
F/t,P/y • Full-time & Part-year
P/t • Part-time

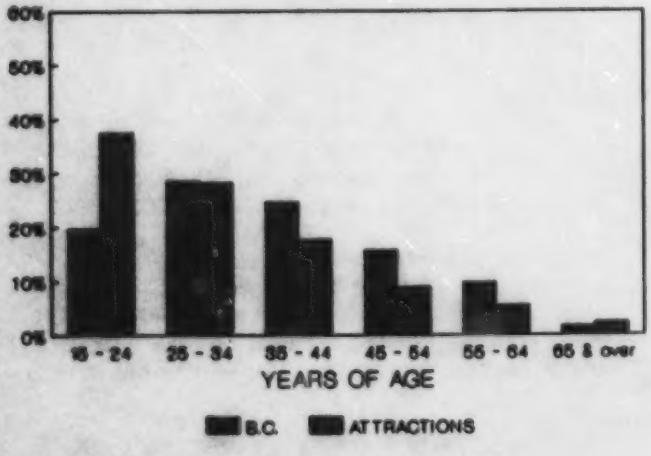
THE ATTRACTIONS SECTOR IN B.C.

1. The Attractions Sector has a slightly higher concentration of women (48%), and slightly lower concentration of men (52%) than in the B.C. workforce.
2. After Food & Beverage, this sector has the youngest workers. 37% are under 25 years of age compared to 20% in the B.C. labour force. Proportionately fewer middle-aged and more 65 & over workers work in Attractions.
3. A very small proportion (19%) has full-time work all year round. Here seasonal full-time (35%) and part-

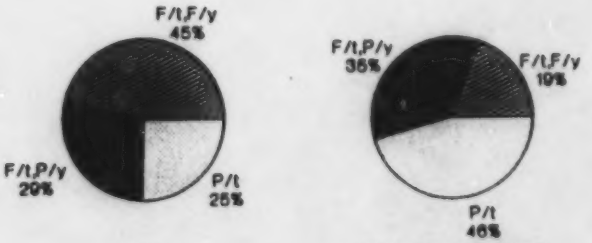
1. MEN & WOMEN: ATTRACTIONS SECTOR



2. AGE OF WORKERS: ATTRACTIONS SECTOR



3. WORK PATTERNS: ATTRACTIONS SECTOR



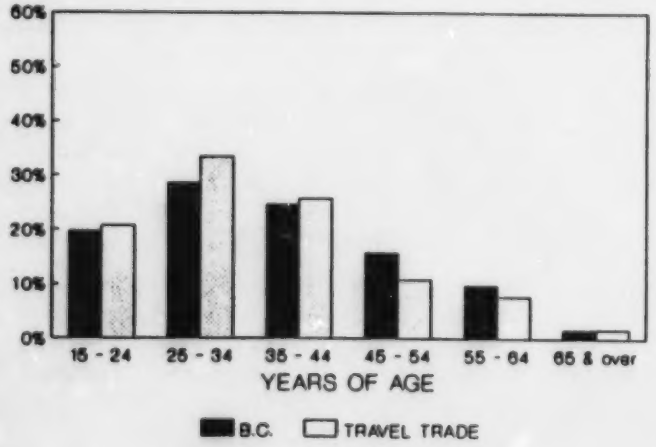
F/t,F/y = Full-time & Full-year
F/t,P/y = Full-time & Part-year
P/t = Part-time

THE TRAVEL TRADE SECTOR IN B.C.

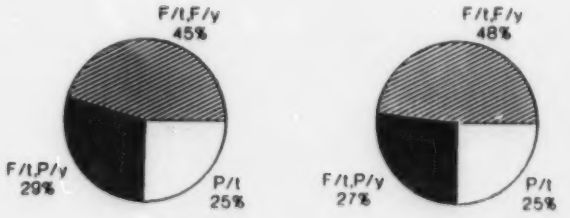
1. 73% of people who work in the Travel Trade in B.C. are women. No other tourism sector has such a high proportion of women, and women are only 43% of the B.C. labour force.
2. People who work in this sector are similar in age to the general labour force in the province, but have a slightly higher concentration of the 25 - 44 year old age group.
3. A very high proportion (75%) of people have full-time jobs, and more have full-time jobs all year round

1. MEN & WOMEN: TRAVEL TRADE SECTOR

2. AGE OF WORKERS: TRAVEL TRADE SECTOR



3. WORK PATTERNS: TRAVEL TRADE SECTOR

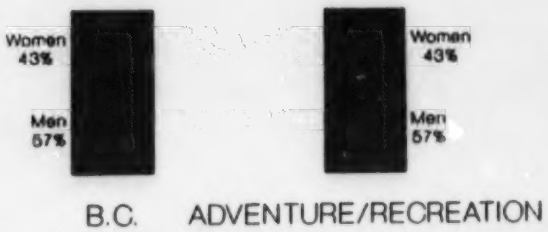


F/t,F/y = Full-time & Full-year
F/t,P/y = Full-time & Part-year
P/t = Part-time

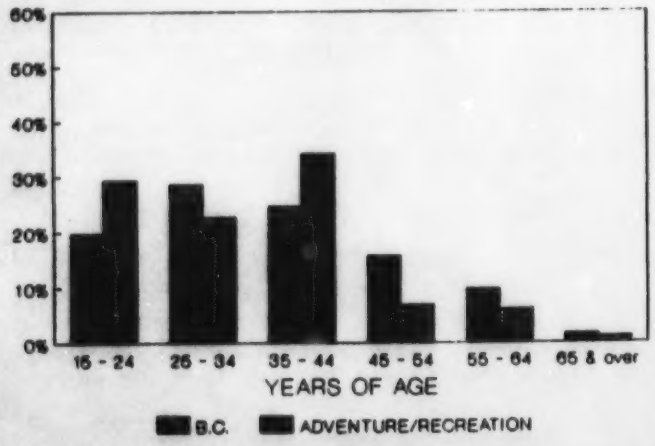
THE ADVENTURE & RECREATION SECTOR IN B.C.

1. Women and men work in the Adventure Tourism & Outdoor Recreation Sector in exactly the same proportion as they do in the B.C. labour force.
2. This sector has a high concentration of young and 35-44 year old workers. Proportionately few middle aged or older workers work in Adventure Tourism & Outdoor Recreation.
3. Almost half work full-time during a season. Full-time work all year round is low, and about one-third works part-time.

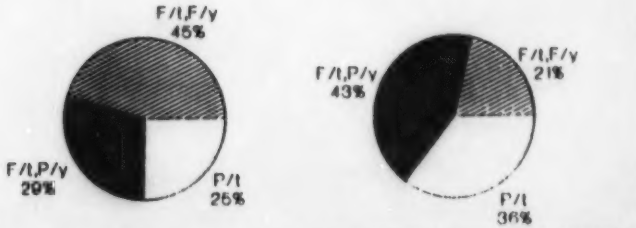
1. MEN & WOMEN: ADVENTURE & RECREATION



2. AGE OF WORKERS:ADVENTURE & RECREATION



3. WORK PATTERNS: ADVENTURE & RECREATION

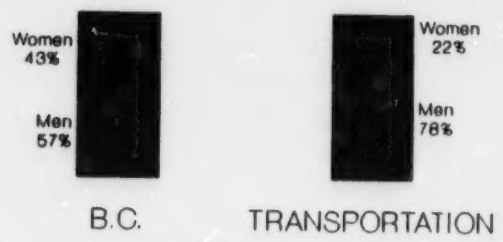


F/t,F/y = Full-time & Full year
F/t,P/y = Full-time & Part year
P/t = Part-time

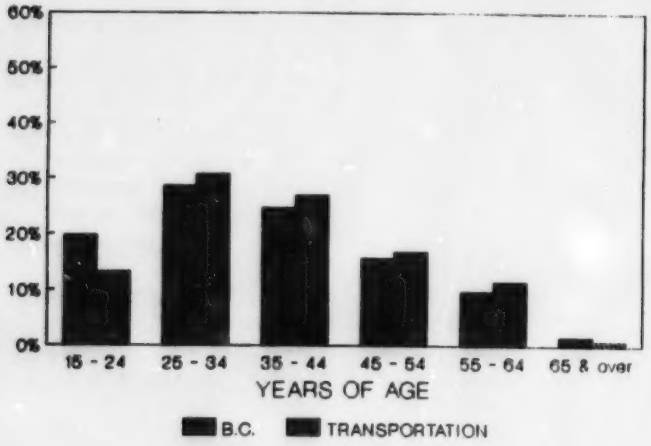
THE TRANSPORTATION SECTOR IN B.C.

1. This is the only tourism sector in which men dominate. They are 78% of the Transportation Sector, but only 57% of the labour force. Women have only 22% of the work in this sector.
2. This is the oldest of the tourism sectors. It has proportionately fewer young workers and more than its proportional share of middle-aged and older workers.
3. No other sector has such a high proportion of full-time jobs (89%) and full-time jobs which last all year round (59%). Few work part-time.

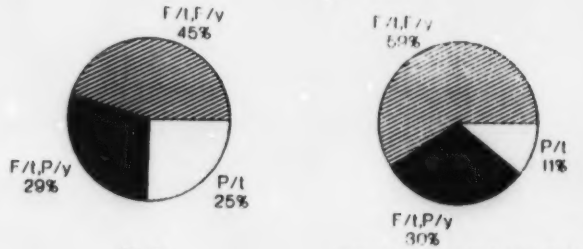
1. MEN & WOMEN: TRANSPORTATION SECTOR



2. AGE OF WORKERS: TRANSPORTATION SECTOR



3. WORK PATTERNS: TRANSPORTATION SECTOR



F/t,F/y = Full-time & Full year
F/t,P/y = Full-time & Part year
P/t = Part-time

6.0 OCCUPATIONS IN THE INDUSTRY

The tourism-related industry in British Columbia is dominated by two occupational groups: Food and Beverage Servers, and Cooks and Chefs. Together these two occupations account for one-third of all employment in British Columbia's tourism-related industries. Indeed, fourteen occupations account for almost two-thirds of the employment.

Exhibit 6.1 Occupational Profile of Tourism-Related Industries: Share of Industry Jobs, 1991.

	% Share
Food & Beverage Servers	19
Cooks & Chefs	12
Managers	6
Supervisors, Food & Beverage	3
Labouring Services	3
Bartenders	3
Cashiers & Tellers	3
Accommodation Cleaners	3
Ticket/Travel Counsellors	2
Supervisors, Accommodation	2
Bookkeepers	2
Hotel Clerks	1
Janitors	1
Salespersons	1
All other occupations	39
	100%

Source: Derived from COPS. Unpublished data.
Note: The definition of Tourism-Related Industries used by COPS differs from that used in Exhibit 2.1. COPS includes SICs 451-5;457-9; 911-4; 921-2; 961-6;969, and the COPS industry grouping does not easily allow individual SICs to be excluded.

Not only do Food and Beverage Servers and Cooks and Chefs dominate in share of employment in the industry, they also overwhelmingly account for the greatest share of the job openings likely in tourism occupations in B.C. between 1991 and the year 2001. It is expected that there will be approximately 14,000 job openings for Food

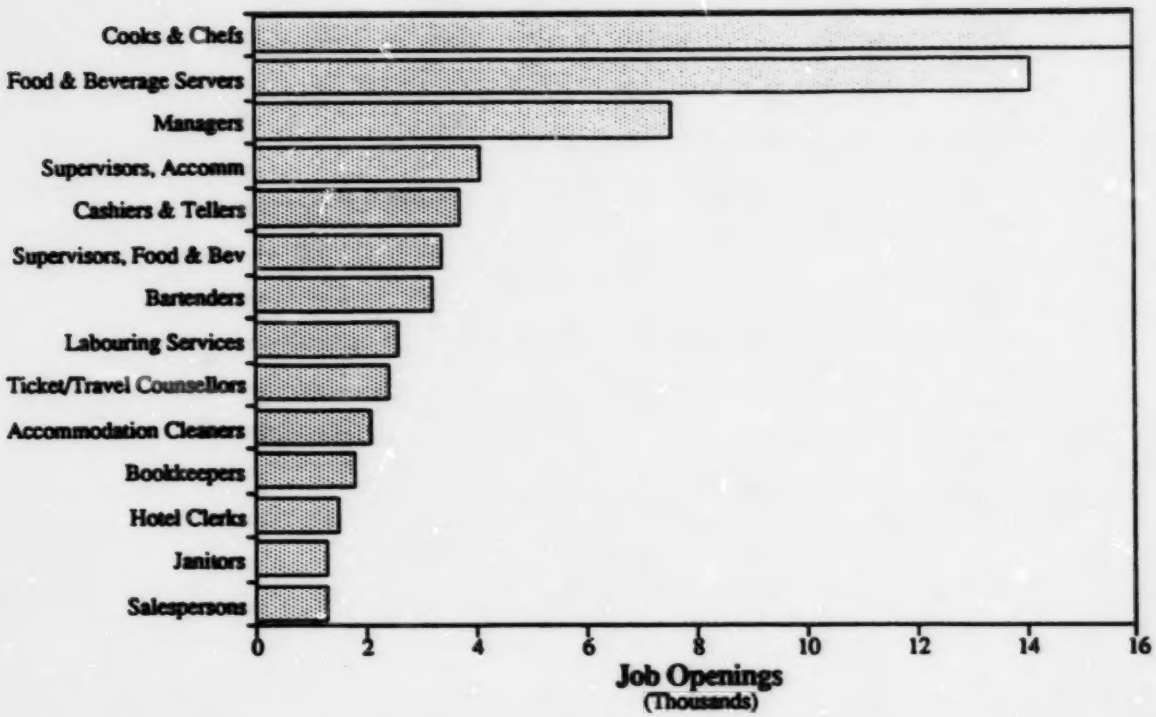
and Beverage Servers and 16,000 job openings for Cooks and Chefs in the tourism-related industry in the coming decade - and this is a conservative estimate.

The COPS demand model provides projections of job openings which are the sum of job openings from net employment growth plus job openings from attrition. However, attrition includes job openings from retirement and death, but not turnover. Since the tourism industry has a disproportionately high representation of young mobile employees, it can be seen that the projected number of job openings for tourism-related industries will be highly conservative. For human resources planning purposes, these are the minimum number of job openings that can be expected.

COPS is the main source for guidance on the relative occupational training needs for tourism. Figure 6.2 shows the dominance of Food & Beverage Servers and Cooks & Chefs, and thereafter, the greatest training needs, either institutional or industry-based, will be for Managers, Supervisors of Accommodation, Cashiers and Tellers, Supervisors of Food and Beverage Preparers, and Bartenders.

Exhibit 6.3 compares the number of job openings in the largest occupations in tourism-related industries and in all other industries. This exhibit will be of particular interest for institutional educators since it shows that for some occupational training, satisfying the training needs of tourism-related industries will satisfy most of the training needs of all industries. That is, the job openings for some occupations are primarily within tourism-related industries: Cooks & Chefs; Food and Beverage Servers; Service Managers;

Exhibit 6.2: Job Openings in Tourism - Related Industries in British Columbia: 1991-2001



Source: Derived from COPS. Unpublished Data.
Note: Job Openings are the sum of job openings due to net employment growth and attrition.

Bartenders; Accommodation & Lodging Cleaners; Travel Clerks & Counsellors; and Hotel Clerks.

Two occupations, Cashiers & Tellers and Bookkeepers, deserve special attention. These are not regarded as "tourism" occupations. However, as Exhibits 6.1 and 6.2 indicate, they are sizeable occupations in terms of employment in tourism-related industries, and they represent a considerable number of job openings in the industry.

For this reason, it would not be wise to assume that their training will be necessarily appropriate to the tourism industry, nor that they will be trained in sufficient numbers for likely job openings. Even though these are not "tourism" occupations, it would be prudent to ensure a tourism module is available for their training, and that numbers trained will be sufficient for future likely demand.

Exhibit 6.3 Job Openings[1] in Tourism-Related and Other Industries: Selected Occupations in British Columbia: 1991 to 2001.

	Job Openings Tourism-Related Industries	Job Openings in Other Industries
Cooks & Chefs	16,000	1,500
Food & Beverage Servers	14,000	400
Managers	7,600	1,200
Supervisors, Accommodation	4,100	3,300
Cashiers & Tellers	3,700	14,200
Supervisors, Food & Beverage	3,400	4,100
Bartenders	3,200	300
Ticket/Travel Counsellors	2,400 [2]	300
Accommodation Cleaners	2,100	600
Bookkeepers	1,800	18,000
Hotel Clerks	1,500	0
Salespersons	1,300	19,100
Janitors	1,300	9,700

Note to Exhibits 6.2 and 6.3.

1.Job openings are the sum of new job openings due to net employment growth and job openings expected from projected attrition rates.

2.Travel trade (and therefore travel clerks working in the travel trade) could not be extracted from the COPS data. Job openings in the tourism-related industries are assumed to be ninety percent of those in all industries.

Source: COPS. Exhibits 6.1, 6.2 and 6.3 were derived from special tabulations from COPS carried out for this study by Diane Alfred, Economic Services Branch, Regional Office, CEIC, Vancouver.

7.0 WORKER PROFILES IN SELECTED OCCUPATIONS

In the previous chapter it was shown that the largest number of job openings in the tourism-related industry to the end of the decade are expected to be in the occupations of Cooks & Chefs; Food & Beverage Servers; Managers; Supervisors, Accommodation; Cashiers & Tellers; and Supervisors, Food & Beverage (see Exhibit 6.2).

Given their importance to the tourism industry, five of these occupations are examined in some depth below: Food & Beverage Servers; Cooks & Chefs; Managers; Supervisors of Accommodation and Supervisors, Food & Beverage Preparers.

More specifically, for each of these occupations we build a profile of people who work in this occupation, including:

- age of workers
- gender
- work patterns (full-time/part-time; full-year/part-year)
- levels of education
- representation of visible minorities
- representation of aboriginal people
- representation of people with disabilities
- regional distribution
- earnings as a percent of average B.C. earnings

All data sources are referenced on page 57, and throughout the chapter percentages may not sum to 100% due to rounding of the raw data.

7.1 Food and Beverage Servers

Food and Beverage Servers in British Columbia work primarily in the Food and Beverage sector (74%) and thereafter in the Accommodation sector (14%) of the tourism-related industry. A very small number work in the Retail industry and some work in Recreation.

This is an occupation dominated by women (78%), and young people, both men and women. 61% of all Food and Beverage Servers are under 25 years of age, 65% of all men working in this occupation and 60% of women. Indeed, 92% of Food and Beverage Servers are under 45 years of age - making this an exceptionally young occupation. By comparison, only 73% of B.C. workers are under 45 years of age.

Exhibit 7.1 Age of Food and Beverage Servers in British Columbia

	Both Sexes %	Men %	Women %
15 - 24 years	60.9	65.4	59.6
25 - 44	31.3	28.3	32.2
45 - 64	7.5	6.0	8.0
65 and over	0.3	0.3	0.2

The majority (58%) of Food and Beverage Servers work mostly part-time, and while women tend to work part-time more than men, it is the young worker who is most likely to work part-time. There are few who have full-time full-year work, showing the essential seasonal and part-time nature of these jobs.

Taking the Food and Beverage sector servers as an example, the following table illustrates that while the majority of workers in this occupation work part-time, young workers do so disproportionately, and the vast majority have seasonal jobs. Two-thirds (66.3%) of the 15 to 24 year olds work part-time, no doubt because many are

still in school, college or university, and for them, this work will not be a part of their planned long-term career.

Exhibit 7.2 Work Patterns of Food and Beverage Servers in the Food and Beverage Sector in B.C.

	Full-time Full-year	Full-time Part-year	Part-time
15 - 24 years	11.4%	22.4%	66.3%
25 & over		26.2%	26.2%
47.6%			

The occupation has good representation of the four groups expected to account for sizeable employment growth in the next decade. We noted above that the majority of Food and Beverage Servers are women. In addition, visible minorities, aboriginal people and people with disabilities are also well represented.

Exhibit 7.3 People in the Occupation

	% of Labour Force in B.C.	% of Food & Beverage Servers in B.C.
Visible Minorities	10.3	12.3
Aboriginal People	3.4	4.3
People with Disabilities	6.6	6.9

The representation of visible minorities and aboriginal people among Food and Beverage Servers is also very high in the city of Vancouver (the only city in the province for which these data are available). Visible minorities make up 16.1% of the Vancouver work force while they are 20.1% of Food and Beverage Servers in the city; aboriginal people are 1.9% of the Vancouver work force but 3.0% of Food and Beverage Servers in the city.

Perhaps because so many people working in this occupation are still in school, the average level of education is low. 60% of all Food and Beverage Servers in the province have a high school certificate or less education. By comparison, only 44% of all B.C. workers have this level of education.

However, if employers prefer Food and Beverage Servers to be high school graduates, it is interesting to note that at least 40% of all workers exceed this level: at least 40% have some form of post-secondary education. Of course, some of these may be college and university students working temporarily as servers.

Exhibit 7.4 Education Levels of Food & Beverage Servers in B.C.

	Both Sexes %	Men %	Women %
High School Certificate or Less	59.9	52.6	62.0
Trade Cert/Diploma	1.4	0.8	1.5
Post-Secondary, no University	20.1	18.6	20.5
University (includes Bachelor Degree)	18.3	27.5	15.7
Bachelor Degree +	0.3	0.2	0.3

55% of Food and Beverage Servers in B.C. are employed in the Lower Mainland; 19% in Vancouver Island; 16% in Okanagan/Kootenay; and 10% in Northern British Columbia.

As noted above, this is one of the tourism-related occupations expected to have among the largest number of job openings to the end of the decade, but the openings that occur cannot be expected to be well-paying.

Valid earnings data are difficult to obtain, and there is good reason to doubt the validity of self-reported earnings. Nonetheless, based upon self-reported earnings by

Food and Beverage Servers in the Census, in 1990 CEIC estimated that full-time full-year workers in this occupation averaged $14,700 (including tips and gratuities) in the province. CEIC also estimated that the average 1990 full-time full-year earnings in the province was $33,300. Therefore, full-time, full-year Food and Beverage Servers were estimated to be earning only 44% of the average full-time full-year earnings in the province

Of course, since the earnings figures were derived from self-reported employment income, it is reasonable to assume some degree of under reporting. Nevertheless, even assuming some under-reporting, it is clear that this is a very low paying occupation in relation to other jobs in the province.

Considering all Food and Beverage Servers in the province, full-time and part-time, full-year and part-year, it was estimated that they averaged only $6600 in earnings in 1990 - a further reflection of the low wages, youthful workers, seasonality and part-time nature of the jobs for people working in the province as Food and Beverage Servers.

7.2 Cooks and Chefs

Cooks and Chefs is the second of the two most important occupations in the tourism-related industry in terms of their current employment share and projected number of future job openings. Seventy percent of them in British Columbia work in the Food and Beverage sector and 10% in the Accommodation sector. Smaller numbers can be found in Health (hospitals), in the Retail industry, and of course, some work in Forestry and Mining.

Unlike Food and Beverage Servers, an occupation largely comprised of women, Chefs and Cooks have almost the same representation of men and women as the rest of the labour force in the province. Fifty-six percent of Chefs and Cooks are men and 44% are women.

Chefs and Cooks are also older than Food and Beverage Servers. 40% of Chefs and Cooks are under 25 years of age and 79% are under 45 years of age. In B.C. 20% of workers are under 25 years and 73% are under 45 years. Therefore Chefs and Cooks are much older than Food and Beverage Servers, but younger than the average worker in the province.

Exhibit 7.5 Age of Chefs and Cooks in British Columbia

	Both Sexes %	Men %	Women %
15 - 24 years	39.6	48.5	28.2
25 - 44	39.2	34.9	44.7
45 - 64	20.5	16.2	26.0
65 and over	0.7	0.5	1.1

Far fewer Chefs and Cooks work part-time and far more have full-time full-year jobs in comparison to Food and Beverage Servers. The majority (58%) of Food and

Beverage Servers work mostly part-time: only one-third (35%) of Chefs and Cooks do. And as in other occupations in the B.C. labour force, women work part-time more often than men and younger workers work part-time more often than older workers.

If we examine just the Food and Beverage sector, where 70% of Chefs and Cooks work, the table below shows that while 57% of Chefs and Cooks under 25 years of age work mostly part-time, only 19% of those 25 years and over do. Almost half of the Chefs and Cooks who are over 25 have full-time jobs that last all year round.

Exhibit 7.6 Work Patterns of Chefs and Cooks in the Food and Beverage Sector in B.C.

	Full-time Full-year	Full-time Part-year	Part-time
15 - 24 years	17.4%	26.0%	56.6%
25 & over	46.1%	34.6%	19.2%

This occupation also has a good representation of the four groups expected to account for sizeable employment growth in the next decade. Women have the same level of representation among Chefs and Cooks (44%) as in the labour force in general, and as the following table shows, aboriginal people and persons with disabilities are also well represented. However, visible minorities have double the representation among Chefs and Cooks as in the general labour force in the province.

Exhibit 7.8 People in the Occupation

	% of Labour Force in B.C.	% of Chefs and Cooks in B.C.
Visible Minorities	10.3	23.4
Aboriginal People	3.4	3.8
People with Disabilities	6.6	7.3

The representation of visible minorities among Chefs and Cooks within the city of Vancouver (the only city in the province for which these data are available) is even higher. Visible minorities make up 16.1% of the Vancouver work force, but they are 38.2% of the Chefs and Cooks who work in the city. No doubt this level of representation is a reflection of the growth in ethnic restaurants in the city as well as a reflection of the degree to which new immigrants (visible minorities and other) have sought work in the Food and Beverage and Accommodation Sectors.

We noted above that Food and Beverage Servers had lower levels of education on average than the B.C. labour force in general. Chefs and Cooks have even lower levels of education. 44% percent of all B.C. workers have a high school certificate or less. 60% of all Food and Beverage Servers have this level of education. But 64% of Chefs and Cooks have a high school certificate or less education. Moreover, because Chefs and Cooks are older than Food and Beverage Servers, fewer of them can be expected to be still in school earning a high school certificate.

The following table also illustrates two other characteristics of Chefs and Cooks in British Columbia. At least one-quarter (26%) have a trade certificate or diploma or have had some non-university post-secondary education. As one would expect, this is a higher percentage of people with post-secondary non-university training than Food and Beverage Servers. And, as one would also expect, Chefs and Cooks are not likely to have university education. Nonetheless, 10% of Chefs and Cooks in the province do have university education including some with bachelor degrees and a very small number (0.2%) with master's or other post-bachelor university degrees.

Exhibit 7.9 Education Levels of Chefs and Cooks in British Columbia

	Both Sexes %	Men %	Women %
High School Certificate or Less	64.0	60.6	68.5
Trade Cert/Diploma	1.6	1.7	1.5
Post-Secondary, no University	24.2	26.7	21.0
University (includes Bachelor Degree)	9.9	10.9	8.8
Bachelor Degree +	0.2	0.1	0.2

Chefs and Cooks have an almost identical geographic distribution as Food and Beverage Servers. 51% of Chefs and Cooks in B.C. are employed in the Lower Mainland; 20% in Vancouver Island; 18% in Okanagan/Kootenay; and 11% in Northern British Columbia.

While Chefs and Cooks report higher wages than Food and Beverage Servers, it is far from being a well-paying occupation. In 1990 it was estimated that full-time full-year workers in this occupation averaged $17,858 in B.C., or 54% of the average $33,300 full-time full-year earnings in the province. Because of its seasonality, proportion of part-time workers and low wages, Chefs and Cooks (considering all Chefs and Cooks in the province, full-time and part-time, full-year and part-year) are estimated to have earned only $10,830 on average in 1990.

7.3 Supervisors, Food & Beverage Preparers

Supervisors of Food and Beverage Preparers (Supervisors (F&B)) supervise and coordinate the work of food and beverage servers and preparers. They include cafeteria supervisors, head chefs, head waiter/waitresses and maitres d'hotel. However, managers of large departmentalized food and beverage establishments are classified as Managers, and are discussed later.

The demographic and employment characteristics of Supervisors (F&B) are interesting. In many ways they are similar to, and in other ways quite different from the people they supervise.

Like Food and Beverage Servers, Supervisors (F&B) in British Columbia work primarily in the Food and Beverage sector (71%) and thereafter in the Accommodation sector (9%) of the tourism-related industry. A small number work in Health (hospitals) and in the Retail industry.

However, whereas Food and Beverage Servers are predominantly women (78%), only half (49%) of Supervisors (F&B) are women.

Not surprisingly, Supervisors (F&B) are much older than Food and Beverage Servers, but they are also slightly older than the labour force in general in British Columbia. 19% of Supervisors are under 25 years of age in the province, compared to 20% of the provincial labour force in general. 72% of Supervisors are under 45 years of age in the province, compared to 73% of the labour force in general.

Exhibit 7.10 **Age of Supervisors, Food and Beverage Preparers in B.C.**

	Both Sexes %	Men %	Women %
15 - 24 years	19.2	17.1	21.3
25 - 44	52.3	54.7	50.0
45 - 64	27.4	27.0	27.8
65 and over	1.1	1.1	0.9

And a very high proportion of Supervisors (F&B) have both full-year and full-time jobs. Though the people they supervise have part-time jobs, and part-year jobs, the majority of Supervisors (F&B) work all year and only a minority (16%) work mostly part-time. This pattern holds for both men and women Supervisors (F&B), though more of the women supervisors work part-time.

Details of their work pattern are shown in the table below. Only one-third of the young Supervisors work mostly part-time, another third work full-time but only for part of the year (i.e. seasonal), and the remaining third work full-year and full-time. By comparison, the Supervisors aged 25 and over mostly work full-time for the whole year (65%), some (24%) work full-time seasonally, and only a few (10%) work part-time. As in other sectors of the economy, supervision is associated with full-time and full-year work patterns.

Exhibit 7.11 Work Patterns of Supervisors (F&B) in the Food and Beverage Sector in B.C.

	Full-time Full-year	Full-time Part-year	Part-time
15 - 24 years	34.7%	30.1%	35.6%
25 & over	65.3%	24.1%	10.2%

Women and visible minorities are better represented among Supervisors (F&B) than they are in the general labour force in B.C. and in Vancouver, but aboriginal people are under-represented. (No data are available for people with disabilities due to the size of the occupation). In Vancouver where visible minorities are 16.1% of the labour force, visible minorities are 27% of Supervisors (F&B).

Exhibit 7.12 People in the Occupation

	% of Labour Force in B.C.	% of Supervisors (F&B) in B.C.
Visible Minorities	10.3	18.9
Aboriginal People	3.4	1.6
People with Disabilities	6.6	n.a.

Supervisors (F&B) are as likely to have high school graduation as other people in the labour force in British Columbia. In fact, men Supervisors (F&B) are slightly more likely to have a high school certificate and women Supervisors (F&B) are slightly less likely to have one. Stated another way, 56% of workers in B.C. have more than high school graduation; 57% of men and 46% of women Supervisors (F&B) have more than high school graduation.

Moreover, one-third of Supervisors (F&B) have non-university post-secondary education and another fifth (19%) has university education. A small percentage (2%) even has a degree beyond a bachelor's degree.

Exhibit 7.13 **Education Levels of Supervisors of Food and Beverage Servers in B.C.**

	Both Sexes %	Men %	Women %
High School Certificate or Less	48.3	42.7	53.8
Trade Cert/Diploma	2.2	3.3	0.9
Post-Secondary, no University	30.2	33.6	26.6
University (includes Bachelor Degree)	17.4	18.4	16.5
Bachelor Degree +	1.6	1.7	1.6

Supervisors (F&B) have the same geographic distribution around the province as we found for Food and Beverage Servers and Chefs and Cooks. 59% work in the Lower Mainland; 19% in Vancouver Island; 15% in Okanagan/ Kootenay; and 7% in Northern British Columbia.

Though people in this occupation may have the responsibility for supervising staff, coordinating service and overseeing costs and sales, and may include head chefs, head waiters/waitresses and maitres d'hotel, nonetheless, this is not a highly paid job in comparison to many in the labour force.

People who worked full-time all year as Supervisors (F&B) are estimated to have earned $23,000 in 1990. Again, since this figure is derived from self-reported employment income, one can assume that it is an under-estimate.

Certainly, the amount reported earned is low. It is only 69% of the 1990 estimated full-time full-year earnings in the province, less than the 1990 estimated average earnings for full-time full-year book-keeping clerks; stock clerks; mail carriers; telephone operators; personnel clerks; among many other workers in British Columbia.

7.4 Supervisors, Accommodation

People who work as Supervisors (Accommodation) coordinate and supervise the work of people who clean and service guest rooms in hotels, motels, trailer parks, apartment houses, office buildings and other lodging facilities. Only half of them work in the Accommodation sector of the tourism-related industry (the remainder are mostly within the real estate industry) and our discussion will be restricted to those working in Accommodation.

Demographically Supervisors of Accommodation are quite different from Supervisors of Food and Beverage Preparation. Whereas half of the latter are women, Supervisors of Accommodation are predominantly (77%) women.

And, Supervisors of Accommodation are older than the other occupations we have examined. Only 8% of Supervisors (Acc) are under 25 years of age in the province, compared to 20% of the provincial labour force in general. 50% of Supervisors (Acc) in the province are 45 years of age or over, compared to only 27% of the B.C. labour force in general.

Exhibit 7.14 Age of Supervisors, Accommodation in B.C.

	Both Sexes %	Men %	Women %
15 - 24 years	8.2	13.4	6.4
25 - 44	42.1	42.0	42.2
45 - 64	47.0	42.7	48.4
65 and over	2.7	1.9	2.9

Approximately half of the Supervisors (Acc) work full-year and full-time; one-quarter work full-time seasonally; and one-quarter work part-time - a work pattern that is very different from that of Supervisors (F&B). And, of course, the work patterns

vary with age. As the following table shows, the younger workers primarily work part-time; the older workers work primarily full-time all year round.

Exhibit 7.15 Work Patterns of Supervisors (Acc) in the B.C. Accommodation Sector

	Full-time Full-year	Full-time Part-year	Part-time
15 - 24 years	14.3%	33.9%	51.8%
25 & over	54.1%	21.3%	24.6%

Aboriginal people and visible minorities are not well represented among Supervisors of Accommodation. But women and people with disabilities are extremely well-represented. The representation of people with disabilities is very high (19.4%) and it is interesting to note that this is due to the high percentage of men with some form of disability who have found work in this occupation.

In Vancouver, the pattern found was similar to that at the provincial level. Aboriginal people and visible minorities are not well represented among Supervisors of Accommodation; women are very well represented. And data on persons with disabilities are not available for Vancouver.

Exhibit 7.16 **People in the Occupation**

	% of Labour Force in B.C.	% of Supervisors (Acc) in B.C.
Visible Minorities	10.3	8.4
Aboriginal People	3.4	2.5
People with Disabilities	6.6	19.4

Note. These data are for all Supervisors of Accommodation, not just those in the Accommodation Sector.

Supervisors of Accommodation have an extremely low level of formal education. Whereas 56% of workers in B.C. and 53% of men Supervisors (Acc) have more than high school graduation, only 36% of women Supervisors (Acc) have more than high school graduation - and women are the overwhelming majority in this occupation.

With these levels of education, Supervisors of Accommodation have the lowest level of formal education of any of the other occupations examined here: namely, Food and Beverage Servers, Cooks and Chefs, Supervisors (F&B) and Managers.

Exhibit 7.17 **Educational Levels of Supervisors (Acc) in B.C.**

	Both Sexes %	Men %	Women %
High School Certificate or Less	64.5	49.7	70.4
Trade Cert/Diploma	1.7	0.0	1.8
Post-Secondary, no University	21.8	27.5	19.4
University (includes Bachelor Degree)	11.6	22.8	8.3
Bachelor Degree +	0.5	0.0	0.0

But in other ways, Supervisors (Acc) have characteristics similar to those of other tourism-related occupations. They have the same geographic distribution around the province as we found for other tourism-related occupations: 59% work in the Lower Mainland; 18% in Vancouver Island; 15% in Okanagan/ Kootenay; and 8% in Northern British Columbia.

And, Supervisors of Accommodation are another low paying occupation in the province. In 1990, full-time and full-year Supervisors of Accommodation in British Columbia were estimated by CEIC to have earned $19,000 on average, or, 57% of the average full-time and full-year earnings in the province. These are higher earnings than those reported by Food & Beverage Servers and Chefs and Cooks, but lower than in other supervisory occupations in the industry, such as Supervisors (F&B), and Managers.

7.5 Managers

Managers in the Service Industry, Services Managers, or more simply Managers, mostly work in the tourism-related industry. Indeed 54% work in the Food and Beverage Sector and 29% in Accommodation. They include hotel and motel operators or managers, restaurant managers, club and lodge directors, managers of catering firms and automobile rentals.

In comparison to many of the other occupations in the Accommodation and Food and Beverage Sectors, Managers are usually men. This is the most senior occupation in these sectors. Men are 64% of all Managers; women are only 37%.

Managers are just also slightly older than the labour force in general in British Columbia. 15% of Managers are under 25 years of age, compared to 20% of the provincial labour force in general. 33% of them are over 45 years of age, compared to 27% of the labour force in general. And women Managers are slightly younger than the male Managers.

Exhibit 7.18 Age of Managers in British Columbia

	Both Sexes %	Men %	Women %
15 - 24 years	14.8	12.6	18.6
25 - 44	51.8	51.9	51.6
45 - 64	31.4	33.2	28.4
65 and over	2.0	2.4	1.4

Food and Beverage Managers are much younger than those who work as Managers in Accommodation. . 76% of Managers in Food and Beverage are under 45; but only 52% of Managers in Accommodation are. Therefore, Food and Beverage Managers

are younger than the general labour force in B.C. and Accommodation Managers are much older.

Not surprisingly, most Managers work full-time all year round. 67% have full-year full-time jobs; about one-quarter work full-time seasonally; and only 9% work part-time. This pattern is very similar for both men and women Managers.

Details of their work patterns in both the Food and Beverage Sector and the Accommodation Sector are shown in the following tables. In both sectors a majority of Managers work full-time all year round. In both sectors older Managers are more likely than younger Managers to have full-time jobs all year round. And Managers in the Food and Beverage sector are more likely than Managers in the Accommodation sector to work full-time all year round.

Exhibit 7.19 Work Patterns of Managers in British Columbia

Managers in the B.C.Food and Beverage Sector

	Full-time Full-year	Full-time Part-year	Part-time
15 - 24 years	52.3%	32.5%	15.2%
25 & over	72.4%	20.4%	7.2%

Managers in the B.C. Accommodation Sector

	Full-time Full-year	Full-time Part-year	Part-time
15 - 24 years	45.5%	34.1%	20.5%
25 & over	67.8%	25.7%	6.6%

We noted earlier than women are still under represented among Managers compared to their representation in the British Columbia labour force, and this is also the case for aboriginal people. No data are available for people with disabilities due to the size of the occupation, but visible minorities are well represented among Managers in the province, as the following table shows. Moreover, in the city of Vancouver, their representation is even higher. In Vancouver visible minorities are 16.1% of the work force; but 25% of all Managers.

Exhibit 7.20 **People in the Occupation**

	% of Labour Force in B.C.	% of Managers in B.C.
Visible Minorities	10.3	16.5
Aboriginal People	3.4	2.1
People with Disabilities	6.6	n.a.

Managers are as likely to have high school graduation as other people in the labour force in British Columbia. 57% have more than high school graduation compared to 56% of all workers in the province. 2% have a Trade Certificate or Diploma; one-quarter have had non-university post-secondary education; one-quarter have been to university; and 3% have a master's or higher degree.

Managers in the Accommodation and Food and Beverage Sectors have similar levels of education, but in general, men Managers are better educated than women Managers.

Exhibit 7.21 Education Levels of Managers in British Columbia

	Both Sexes %	Men %	Women %
High School Certificate or Less	43.1	38.5	51.2
Trade Cert/Diploma	2.3	2.3	2.2
Post-Secondary, no University	25.9	27.0	24.0
University (includes Bachelor Degree)	25.9	28.5	21.2
Bachelor Degree +	2.6	3.2	1.4

The geographic distribution of managers around the province is not surprising. There is a slightly smaller proportion in the Lower Mainland, no doubt reflecting the larger size of establishments in that area, but generally the distribution of Managers follows that of the other occupations in these two sectors. 53% of Managers are in the Lower Mainland; 17% in Vancouver Island; 20% in Okanagan/ Kootenay; and 10% in Northern British Columbia.

Of the occupations in the Tourism-related industry examined in this study, Managers are the highest paid. However, the earnings they receive are not high in comparison to other Managers in the province. In 1990, full-time full-year Managers were estimated to have earned $24,400, or 73% of the average full-time full-year earnings in the British Columbia labour force.

To gauge the relative earnings of Managers, consider the data contained in the following table. All people holding managerial positions in the province are categorized into 14 management occupations. Most managers in the Tourism-related industry are Services Managers - those described in this chapter - and as can be seen, they earn the least of all managerial categories in the province.

Exhibit 7.22 Estimated 1990 Earnings of Managers in B.C.

Management Occupations in British Columbia	Estimated 1990 Full-time Full-year Earnings ($)	% of Jobs Full-time Full-year
General Managers & Other Senior Officials	$68,100	81
Natural Science & Engineering Man.	60,600	82
Teaching Administrators	53,600	53
Transport & Communications Managers	47,900	87
Personnel & Industrial Relations Man.	47,800	77
Financial Managers	47,000	87
Production Managers	46,400	78
Medicine and Health Administrators	45,300	76
Construction Operation Managers	45,300	65
Social Science Managers	39,300	70
Purchasing Managers	38,800	81
Sales & Advertising Managers	36,200	77
Farm Managers	25,200	59
Services Managers	24,400	63

It is clear from the above table that Managers in the tourism-related industry are among the lowest paid managers in the province. Services Managers are the lowest paid and they would include many of the Managers in Accommodation; Food & Beverages; Attractions; Adventure Tourism & Outdoor Recreation; Events & Conferences; and Travel Trade. Managers in the other two Tourism-related sectors of Transportation and Tourism Support Services are well paid: $47,900 for Transportation Managers and Government Administrators earned $49,500 on average for full-time full-year work.

But not only are Services Managers the lowest paid managers, they have among the smallest proportion of managerial jobs that are full-time and last all year round. Only 63% of Services Managers work full-time all year round whereas 70-80% of other managers in the province have year round full-time jobs. This means that not only

are Services Managers the lowest paid, but among their ranks they have one of the smallest proportions of people who get to earn this full-time full-year wage.

Sources for 7.0 Worker Profiles in Selected Occupations.

All data in this section are unpublished data from the 1986 Census, Statistics Canada, provided by Tourism Canada, with three exceptions.

(i) Information on visible minorities, aboriginal people and people with disabilities working in the occupation were obtained from 1986 Census data in the 1986 Employment Equity Availability Data Report, Employment Equity Branch, CEIC, Ottawa. Data on visible minorities and aboriginal people are for people who worked in the labour force in 1985 or 1986 (Table 5); data on people with disabilities are for people who worked anytime between 1981 and 1986 (Table 15).

(ii) 1990 earnings by occupation were obtained from 1990 Estimated Annual Earnings, British Columbia/Yukon, prepared by the Regional Economic Services Branch, B.C./Yukon, CEIC, Vancouver.

(iii) Job Futures (1989) published by CEIC, British Columbia/Yukon and the B.C. Ministry of Advanced Education and Job Training was the source of data on the geographical distribution of employment around the province.

8.0 FUTURE PROJECTIONS AND PROFILES

The purpose of this report has been to provide employment data on the British Columbia tourism-related industry as one part of the background information being assembled for human resource planning in the industry. The report is a background document for A 1990's Blueprint for Action: Tourism Human Resource Development for British Columbia.

More specifically, the purpose of the study and report was to:

- Develop an employment profile for the tourism industry in British Columbia and for each of the industry's eight sectors;
- Provide short and long-term employment projections for each of the eight tourism sectors;
- Develop a profile of the occupations in the industry; and,
- Describe the demographic characteristics and work patterns of people who work in the tourism sectors and in occupations of particular importance in the industry.

The primary study parameters were that only secondary data would be used and the employment estimates derived would be compatible with the eight sector industry definition of the Pacific Rim Institute of Tourism and the sectors being used in the Tourism Satellite Account.

Main Findings

Details of each employment aspect addressed can be found in the body of the report, however, general findings follow.

1. 1990 employment in the Tourism-related Industry was found to be 181,600, with the vast majority of people employed (84%) working in the three sectors of Food & Beverage, Transportation and Accommodation.

2. Employment for the total eight tourism-related sectors is projected to increase to 242,000 by the year 2001, a net increase of over 60,000 from the 1990 employment level.

3. The two sectors of Food and Beverage and Accommodation are expected to account for most (70%) of the increase in employment to the end of the century, but the smaller sectors of Adventure Tourism and Outdoor Recreation, Attractions and Travel Trade are also expected to experience more than their proportional share of the increased employment.

4. The tourism-related industry can expect healthy employment growth over the next decade, at a pace faster than that of the province as a whole.

5. The average annual growth rate of employment in the industry in B.C. to 2001 is projected to be 2.6%, or one-and-a-half times the annual average growth rate in employment in general.

6. Among the eight tourism sectors, annual growth rates are projected to be highest for Travel Trade, Attractions and Adventure Tourism and Outdoor Recreation. Annual growth rates for Food and Beverage and Accommodation are also projected to be above those of the province in general. However, employment growth in Transportation is projected to be well below the provincial average.

7. Demographic profiles of people who work in the tourism sectors vary greatly.
   - People in the Food and Beverage Sector tend to be very young, mostly women, mostly working in part-time jobs.
   - The Transportation Sector has much older workers, most of whom are men in full-time work all year round.

- The Attractions Sector and Adventure Tourism and Outdoor Recreation Sector have high proportions of young people and a low number of full-time jobs that last all year round.
- People working in the Accommodation Sector are similar in age to the B.C. worker in general, but proportionally more are women and part-time and seasonal work is more common than for the B.C. labour force.
- The Travel Trade Sector has the highest concentration of women, a good proportion of whom have full-time jobs all year round.

8. The tourism-related industry in British Columbia is dominated by two occupational groups: Food and Beverage Servers, and Cooks and Chefs. Together these two occupations account for one-third of all employment in British Columbia's tourism-related industries.

9. These same two occupations, Food & Beverage Servers and Cooks & Chefs are expected to have the largest number of job openings to the year 2001. Other occupations with large number of job openings are projected to be Managers, Supervisors of Accommodation, Supervisors of Food & Beverage, and Cashiers and Tellers.

10. Profiles of the age; gender; education; work patterns; representation of aboriginal people, visible minorities and people with disabilities; regional distribution of employment; and 1990 earnings as a percent of the average earnings in the province for people who work in five occupations (Food & Beverage Servers, Cooks & Chefs, Managers, Supervisors of Food and Beverage, and Supervisors of Accommodation) were developed for the study. The characteristics of people who work in these occupations vary greatly and the reader is referred to Section 7.0 for discussions of their profiles.

Future Projections

This study has provided an employment profile for the tourism-related industry for 1990, and employment estimates by sector to the year 2001.

But clearly, projections are limited by the information available at the time they are made. From time to time they should be up-dated and adjusted to allow for unforeseen swings in employment and the economy.

The approach used in this paper will allow the employment projections to be up-dated regularly, at minimal cost and effort, as economic conditions change, since both the Labour Force Survey employment figures and the COPS forecasts are updated annually.

It is strongly recommended that the Pacific Rim Institute of Tourism use the LFS employment figures to measure employment in the tourism-related industry each year, and that the expertise at CEIC (B.C./Yukon Region) be consulted for updated employment and occupational projections, from time to time.

Future Profiles

The main source of data on the demographic and employment characteristics of workers is the Census of Canada. In this study the 1986 Census was used extensively.

In 1992 and 1993 occupational data from the 1991 Census will become available, and it is recommended that now that the Pacific Rim Institute of Tourism has baseline profiles of the sectors of the tourism industry and its workers, periodic update of these profiles be carried out. In this way a firm basis for measuring change in the industry and the people who work within it will be possible.

Some future changes in worker profiles can be anticipated since it is well recognised that the supply of labour will change markedly this decade.

We know that there will be fewer young people coming into the labour force and that this will be a critical factor for tourism sectors such as Food & Beverage which were found to have very high proportions of young workers. We know the labour force is aging, and we know there will be increased competition among employers for skilled workers.

Less well-known is the composition of labour force growth.

- women will form a larger segment of the work force.
- minority groups - visible minorities, aboriginal people and people with disabilities will have a greater presence in the work force.
- there will be a growing need to retain and retrain older workers.

During this upcoming decade, 80% of new entrants to the labour market are projected to be visible minorities, immigrants, and women. By the year 2000, visible minorities are forecast to account for half of the annual growth in the labour force.

Of the tourism occupations profiled in some depth in this study:

- 4 of the 5 had average to very high representation of women, the most senior occupation of Managers being the exception;
- 4 of the 5 had higher than average representation of visible minorities, the exception being Supervisors of Accommodation;
- aboriginal people had the same or higher representation than the labour force in two occupations, but were under-represented in the 3 supervisory and management occupations;
- people with disabilities were well represented in the 3 occupations for which these data were available.

Thus, these tourism occupations have work forces with good representation of the groups which are expected to form a large segment of the labour force growth this decade, and should expect substantial increases in their representation in the future.

Finally, a primary concern in the 1990's will be competition for qualified employees. Pre- and post-employment training and upgrading will take on added importance.

For human resource planning, one must ask what implications the comparative earnings data have for attracting and retaining employees, and the degree to which these earnings will motivate training.

It remains for the new tourism human resource plan (being prepared by Barbara J Mitchell and Associates and due for publication in Spring 1992) to place the implications of these and the other employment issues raised in this study in a larger context, balanced and modified by other information gathered for the planning project. It is expected that the employment estimates, projections and worker profiles developed here will provide a firm basis for that task.

APPENDICES

APPENDIX I: DATA SOURCES

DATA SOURCES.

This appendix provides a brief overview of each data source examined in the study.

1. The Labour Force Survey (LFS).

The LFS is a survey of 62,000 households across Canada, including 5500 households in British Columbia. As survey households average 2.1 persons each, the sample for British Columbia approximates 11,550 people.

The LFS is a long-standing survey conducted monthly by Statistics Canada, and provides a snapshot of employment and unemployment during one specific week in each of the twelve months of the year. When the employment levels over the twelve months are averaged ("annual averages"), a measure of the average employment activity during the year is obtained. For tourism this means the average employment for the year is obtained; the seasonality is averaged out.

Without realizing it, most Canadians frequently read the results of the LFS; it is the source of the unemployment statistics reported in the newspaper each month. And tourism specialists will recognise the LFS as the sample used for the Canadian Travel Survey. Within British Columbia, the LFS is used by Planning and Statistics in the Ministry of Finance as a basis for their employment projections, and is used by EIC as a bench mark for COPS each year.

In this study, the LFS is the main source for 1990 employment levels in the tourism industry.

2. The Canadian Occupational Projection System (COPS).

COPS (the Canadian Occupational Projection System) has involved a large scale intensive research effort by CEIC over 15 years and costing tens of millions of dollars.

A key underpinning of COPS is a detailed econometric forecasting model, entailing several hundred equations. The model forecasts results in terms of economic growth by industrial sector "drive" the employment and occupational projections within COPS.

The econometric model uses as inputs a myriad of domestic and international data e.g. population growth (immigration, fertility, etc), world oil prices, economic growth in the U.S., U.S. housing starts, U.S.: Canada exchange rates, bond rates, etc.

COPS has a high degree of credibility and is used extensively by federal and provincial government departments.

Moreover, B.C. is fortunate that it has expertise within CEIC to adjust the COPS model to local economic conditions. National models such as COPS can contain a bias not appropriate for B.C., but local CEIC expertise modifies the COPS projections for B.C.'s economic conditions.

It is recommended that the tourism industry takes advantage of the expertise and experience embodied in COPS for future tourism employment projections.

3. The Census

The five-yearly census carried out in Canada is the most valuable source of industry data available. Though many people feel it is intrusive, it is the most important source of marketing information that exists. Unfortunately, since it is very expensive, it is only carried out once every five years.

The census is a 20% sample of all households in Canada - a sample size of over 5 million people for Canada, and more than 1/2 million for British Columbia. From these extraordinarily large samples, we get good employment, occupational and industry details for the province. We can find the number of people who work full-time or part-time in an industry; the wages they made; how much education they have; their age; their province, the city or town they live in; among many more details.

Tourism Canada in Ottawa had collected data on people in specific occupations of particular importance to the tourism industry. These data were selected for use in Section 6. Employment and Immigration Canada in conjunction with Statistics Canada used the 1981 and 1986 Censuses to calculate the share of employment of visible minorities in various occupations, and these data are used in Section 8.

4. The Satellite Account

The B.C. Tourism Satellite Account is a long-term research project sponsored by the B.C. Ministry of Development, Trade and Tourism to develop a formal tourism industry sector as part of the Provincial Economic Accounts. Its focus to-date has been on Revenue and Expenditure profiles of various tourism-related businesses. Employment data for each sub-sector is incomplete.

Presently the Satellite Account has employment figures for the large hotels (250+ rooms) only. For these hotels it estimates employment at 4300 FTE for 1988, where FTE are derived by dividing total number of hours worked by 2080 hours (52 weeks x 40 hours per week) to obtain 1 FTE (full-time equivalent). The data on total number of hours worked were based on hotel payroll records, and are therefore very good.

However, large hotels are but one portion of the total accommodation sector (about 28% when measured by room revenues). And, of course, accommodation is but one part of all tourism in British Columbia.

No employment data exists in the Account for the other sectors of the industry. It is planned to derive FTE employment from the total wage and salary bill for other sectors, but the average wage by sector is not known at this time.

Further, employment is given in the Account in terms of FTE; not headcount. For human resources purposes, the distinction between the two is considerable. That is, if one job has 1 person working in it for the year, then training needs are for that person. If the same job has 5 part-timers, it can still be 1 FTE if their work adds up to the equivalent of one person working full-time, but training for 5 people are needed. Therefore, with training costs being millions of dollars annually for the province, wherever possible, headcounts not FTE are needed.

5. One-time Sub-Sector Studies

The B.C. Ministry of Development, Trade and Tourism has sponsored a series of sub-sector studies over the past five years: e.g. marine tourism, cruise ship, adventure travel, guest ranches, guide/outfitters. While these one-time sub-sector studies are extremely valuable, they are not replicated each year; and each study measures employment in different years.

Some of these studies were used to help estimate 1990 sub-sector employment, and are fully referenced under Sources to Exhibit 3.1.

6. Other Sources

We met with several technical experts on the labour force and related areas, to determine if there were further data sources that could be used. No further sources were identified. Most used COPS and the LFS themselves, and of course, all were familiar with the Census.

Potential data sources were discussed with:

Steve Miller and **Ann Kittridge**, Planning and Statistics Division, British Columbia Ministry of Finance, Victoria.
David Redekop, Canada Tourism Research Institute, Conference Board of Canada, Ottawa.
Ruth Emery, Chief of Economic and Market Analysis at EIC in Vancouver.
Jim Howie, Ministry of Advanced Education, Victoria.
Sylvia Waterer, British Columbia Ministry of Tourism, Victoria.
Jim Johnson at Pacific Analytics, Victoria
Wendy Swedlove, Tourism Canada, Ottawa.
Fatma Majed (a former analyst with Tourism Canada), Ottawa.
Doug Thompson of Ivation Data Systems Inc (a consultant to Tourism Canada), Ottawa.

These interviews and discussions took place in **Vancouver**, **Victoria** and **Ottawa**.

APPENDIX II: EMPLOYMENT IN TOURISM SERVICES AND EVENTS AND CONFERENCES

TOURISM SERVICES EMPLOYMENT (Annual Average)

	Number Employed
Tourism Infocentres	110
Tourism Consultants	70
Government	75
Tourism Trade Press	15
Tourism Labour Organisations	30
Tourism Sector Associations	60
Tourism Regional Associations	70
Tourism Educators	50
Tourism-related Advertising	25
Total Tourism Services	**505**

EVENTS AND CONFERENCES EMPLOYMENT (Annual Average)

	Number Employed
Conference Planning	445
Conference centres	
Conference management companies	
B.C. Pavilion Corporation	
Conference Services	75
Festivals and Events	1235
PNE	
Molson Indy etc.	
Other community events and festivals	
Total Events and Conferences	1755

Source: Primary data collected by the Pacific Rim Institute of Tourism.

Notes on Events and Conferences.

1. Some double counting occurs in the employment figures for Events and Conferences and Attractions.
2. Estimates exclùde meeting planners employed by non tourism-related B.C.businesses.